

Determination for Eligibility of Income Tax Services

Taxpayer Name _____

What is your current military status?

- ☐ Active Duty
- ☐ Retired (20 or more years of active duty service or retired Reservist currently receiving retired pay)
- ☐ Dependent Family Member (of Active Duty or Retired)
- ☐ National Guard/Reservist (must be Title 10 status and provide copy of orders)
- ☐ Other

If you select yes to any of the following questions, you may not be eligible for our services. The Tax Center staff should review your documents prior to your completing the Client Agreement and Questionnaire.

Did you receive any of the following forms?

- ☐ Yes ☐ No Form 1099-A - Acquisition or Abandonment of Secured Property (Foreclosure)
- ☐ Yes ☐ No Form 1099-B – Stock, Mutual Funds
- ☐ Yes ☐ No Form 1099-C - Cancellation of Debt (Foreclosure)
- ☐ Yes ☐ No Form 1099-Misc (Self-Employment with expenses deducted)
- ☐ Yes ☐ No Form 1099-Q - Coverdell/ESA withdrawals
- ☐ Yes ☐ No Form 1099-S - Proceeds from Real Estate Transactions
- ☐ Yes ☐ No Schedules K-1, partnership or S corporation, or estates or trust

- ☐ Yes ☐ No 1. Did you earn Self-Employment Income from contract labor, small business, hobby, etc.? (Form 1099-Misc) (The Tax Center staff will only prepare SCH C-EZ which does not allow for deduction of expenses.)
- ☐ Yes ☐ No 2. Did you or your spouse convert a regular IRA to a ROTH IRA (Form 1099-R)?
- ☐ Yes ☐ No 3. Are you a landlord with rental income/expenses and placed in service in 2009 or own more than one rental property?
- ☐ Yes ☐ No 4. Did you or your spouse sell or dispose of rental property?
- ☐ Yes ☐ No 5. Did you have a foreclosure or did the bank cancel any part of your mortgage loan?
- ☐ Yes ☐ No 6. Did you cash any U.S. EE or I Bonds to pay for postsecondary education for yourself, your spouse, or your dependents?
- ☐ Yes ☐ No 7. Did your children receive more than \$950 and less than \$9,500 from interest and dividends that you wish to claim on your own tax return instead of your child's return?
- ☐ Yes ☐ No 8. Did you earn dividends with foreign tax over \$300 (\$600 married filing jointly)?
- ☐ Yes ☐ No 9. Did you receive a lump sum from an employer sponsored plan and the recipient and/or employee was born before 1936? (Form 1009-R)
- ☐ Yes ☐ No 10. Have you had prior year nondeductible IRA contributions? (Form 8606)
- ☐ Yes ☐ No 11. Did your children receive more than \$950 and less than \$9,500 from interest and dividends that you wish to claim on your own tax return instead of your child's return?
- ☐ Yes ☐ No 12. Did you sell any stocks or mutual funds? (The Tax Center staff will not calculate cost basis. If the purchase date and price, sale date and price, and cost basis for each transaction is not included on your Form 1099B, you will need to contact your financial agency to get this information. Your return cannot be prepared without it.)